

Pastoral Succession Planning for Churches

by J. Russell Crabtree

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Q *What do you mean by “Pastoral Succession Planning?”*

A Pastoral Succession Planning is a process that develops a plan for replacing the current pastor and begins to implement that plan prior to the current pastor’s departure.

Q *Isn’t that a rather strange idea to ask congregations to think about?*

A I find it is not as strange to congregations as many people might think. Many members of congregations, including their lay leaders, are very familiar with succession planning in other contexts. Businesses almost always have a succession plan for their leaders and would consider it irresponsible for an executive not to have one. Service organizations generally provide a way to replace their retiring leaders *before* they leave, and have someone ready to step into their position as they go. Even in the church, there is generally a succession plan in place for board members (elders, deacons, vestry members, etc) so that a person is ready to step into their position as they leave it. Only with pastors do we wait until they leave before we make a move to replace them. Given the general experience of most congregational leaders, it is the church’s approach that seems strange.

Q *How is Pastoral Succession Planning different from our current approach?*

A. I would call our current approach Resignation Management Planning. A Resignation Management Plan is *focused* on how to react when the pastor announces his or her resignation. Since it is assumed that the resignation cannot be talked about in advance it cannot be anticipated by congregational leaders. For the unsuspecting congregation, a pastoral resignation is something like a natural disaster, say a tornado, which cannot be controlled but only reacted to. A Resignation Management Plan lays out a set of steps for a congregation to take in reaction to a resignation that sets up emergency services (interim pastor) and prepares the church for a long period of recovery (interim ministry) that will eventually lead to calling a new pastor.

Q *Are you saying that we should change our transition process from Resignation Management Planning to Pastoral Succession Planning?*

A Yes. Right now Resignation Management Planning is the norm in the church with Pastoral Succession Planning the rare exception. I believe we should turn that on its head. Pastoral Succession Planning needs to be the standard procedure for clergy leadership just like it is for lay leadership. Managing totally unexpected transitions should be the less common approach.

Q *What’s wrong with Resignation Management Planning?*

A There are many problems. First, a pastoral transition is one of the most important strategic issues facing any congregation. To develop a strategic plan that does not address this issue is building on sand. It could all fall apart with one phone call. Second, giving people additional stress without a sense of control is the fastest way to burn them out, which is what happens to a number of lay leaders during a transition. Third, under Resignation Management Planning, pastoral transitions are financially expensive. Without a plan in place churches often see declines in revenue up to 15% a year while the church is incurring additional, unanticipated expenses for goodbye parties and gifts, search committee expenses, relocation expenses, and larger compensation packages for new calls. Fourth, under Resignation Management Planning larger churches lose quality staff during a transition because there is no retention plan in place. Fifth, under Resignation Management Planning, church leaders must make one of their most important transitional leadership decisions under enormous time pressure: finding a highly qualified, skilled, and available interim pastor. They often fail this task, for reasons beyond their control. Finally, and perhaps most important, Resignation Management Planning encourages the development of a passive, dependent, and reactive leadership philosophy among the lay persons of the church which sits crosswise our stated theology of lay ministry and lay empowerment.

Q *Ok. Put that in plain English for me.*

A Simply put, under Resignation Management Planning, the church is much more likely to enter a significant decline in terms of the four M's: members, ministry, morale, and money.

Q *But they'll bounce back when the new pastor arrives. Right?*

A My experience is that it can take a number of years for a church to bounce back from an unplanned, extended leadership vacuum. For churches operating just above the financial threshold that affords a full time pastor, a reactive pastoral transition can drop them back to part time pastoral services, a state that is very difficult to recover from.

Q *Don't churches need time to grieve a beloved pastor?*

A Who died? I understand that grief is broader than losing someone to death. But by making grief an all encompassing concept around all types of losses we fail to note what makes them distinctive. A pastoral departure is different from a death. It is a change in the relationship. For some people in the congregation, the change is positive. They have been waiting for the Pastor to go. Others may have followed the leadership of the pastor, but they didn't feel closely aligned. Still others actually appreciated the pastor's leadership and will miss that skill in the organization, but it is not a personal loss. Those who are really close to the pastor will probably stay in touch on a personal basis. To lump the entire organization under the diagnostic category "grieving" is just not accurate.

However, I find that under Resignation Management Planning, there often is a profound grief that does set in, typically around the sixth month. At this point, the congregation realizes it is losing vitality, effectiveness, and resources. Unlike the uneven experience of grief around the personal loss of the pastor, this is a grief that is shared by nearly everyone! It is brought about, not by the pastor's leaving, but by a reactive, unplanned approach to pastoral transitions that does not insure leadership competence and continuity. The problem is that many well-meaning church consultants lump all these losses together under one big unavoidable GRIEF and encourage members to see every problem as a result of it.

Q *How is Pastoral Succession Planning different in the way it approaches grief?*

A Pastoral Succession Planning adopts a fundamentally different model for its approach. Resignation Management Planning is built on what I call a psycho-social model. It tends to define the entire process in terms of a projected psychological state of members and the system of their social relationships. Pastoral Succession Planning is built on a strategic-resiliency model.

Q *What's a strategic-resiliency model?*

A A strategic-resiliency model focuses on the strategic direction of a congregation and the capacities of a congregation that help it "bounce" in response to change. It does not deny that there are psychological and social dimensions to a transition but it argues that a focus on these elements leads to an internal orientation that usually generates an illness-based mindset that is self-fulfilling. In contrast, a strategic-resiliency model is health-based. It assumes that if we build on the health of a system the system can generally deal with change without major dysfunction. In this model any dysfunction that does arise is dealt with by the system itself.

Q *How do you make a church resilient in the face of a pastoral transition?*

A Well the first thing you do is treat members like adults and provide them with information. There is no reason that a retiring pastor cannot give folks information about his or her retirement plans a year in advance. You also tell them the truth about what is likely to happen to them if they don't take this transition process seriously and become passive in the process. A little anxiety is a good thing. The second thing you do is train them in how to do succession planning, and then develop a solid, realistic plan with them. The third thing you do is make sure they have quality resources to assist them in the process. The fourth thing you do is give them models of success to generate hope. The fifth thing you do is encourage them to develop resiliency by focusing on certain activities and exercises. (I give them the 10 commandments of resilience). Finally you can help a church focus on what it does well and what is unique about it so that energy can be directed to sustaining what is already strong.

Q *Sounds like a lot of work. Are congregations willing to take this on?*

A Here is one the biggest surprises for me in this work. When members are surveyed about their level of availability to help with transition tasks, about a third of them indicate they will be *more* available. In other words, during the time that we are most likely to treat church members as grieving and needing time to "recover" they are actually hungering for ways to make a meaningful contribution.

I find that members are bright enough to know that this is a critical time for their church and they are ready to carry additional responsibility if someone will simply equip and mobilize them!

Q *What transition tasks are you talking about?*

A Let me give you a specific example. As I said earlier, the strategic-resilience model recognizes that people are going to have reactions to the loss of the pastor and will require ministry. But instead of equipping people to minister to one another, the psycho-social model assumes that people are so compromised in the transition that only an interim pastor can minister to them. Some churches have extensive lay pastoral ministries that are never utilized to address the transition. My approach is to identify the folks who do pastoral ministry in the church (eg Stephen's Ministry) and charge them with developing a spiritual oversight dimension to their work during the transition that becomes part of the Pastoral Succession Plan. But we never think about equipping members to minister to one another in the transition because we are so focused on their "trauma" that we deem them incapable. That is just one transition task that needs to be addressed. There are many others and lay persons can handle almost all of them.

Q *How about another example?*

A Money. Many churches slide financially during a transition. What is interesting is that roughly 10% of members indicate they are willing to give more or much more money to help with the transition. But the Resignation Management Planning approach articulates no clear vision for the process making it difficult to call people to give financially to turn that vision into a reality. Lay persons can craft a financial campaign to create a fund specifically to support the transition. How much better start a new pastor might have if he or she were told at their arrival that members had put \$10,000 to \$20,000 aside to fund a new ministry initiative!

Q *Ok, I think we have the resiliency side of it. What about the strategic side?*

A I obtained the mission statements of about 25 churches a number of years ago and compared them. What I discovered is that they were virtually the same. They told me nothing distinctive about the congregation. Forty years ago, churches were much more homogenous. Today, churches have many options about their strategic direction (though they may not realize this) and they must be clear in order to call a pastor that can take them where they want to go. And...they must be willing to go where they say they want to go. They must have strategic congruence.

Q *What is strategic congruence?*

A Strategic congruence is consistency between strategic aims and tactical goals. For example, many congregations will indicate that strategically they want the church to grow. But tactically, they insist that things be done in the same way they have always been done. Helping a congregation sort this out and discover best practices for a given strategic direction is one of the most important tasks to be addressed in the Pastoral Succession Plan.

Q *Sounds like there is a lot to be done in a Pastoral Succession Plan. I thought the idea was to make the transition shorter.*

A People often hear me talk about the problems with the Resignation Management Planning approach as if I am only concerned with the fact that it takes, on average about 18 months for a church to call pastor. But this is not simply a way to get a pastor faster. It is, in some ways, a more complex task. There are many transition tasks that need to be covered in the Pastoral Succession Plan. It is a little bit like changing the spark plugs in a car while it is moving down the road 60 miles an hour! What makes this all doable is that much of it can be accomplished while the pastor is still on board. But this requires that we learn to talk about succession planning and not merely react to a resignation.

Q *So how much time should it take?*

A It depends upon the church. Different church cultures have different transition characteristics. A Roman Catholic congregation has what I call an archival culture which enables it to have one priest leave on Sunday and a new priest arrive the next. The departing pastor may come back to the parish to do weddings, funerals, or even preach. This would be unheard of in some Protestant churches and considered to be a major violation of boundaries. In most cases it will take 12-18 months to develop and implement a succession plan. But because much of the work is done while the departing pastor is still on board, the time gap between the departing and arriving pastor may be non-existent (in some cases there is an actual overlap). Even if there is the need for interim ministry, the time gap will be relatively small.

Q *But what about the situation where the retiring pastor has been at a church for 15 or more years? Doesn't this require a long interim?*

A In my experience, this is a no-win situation for the church. If the interim is not as competent as the previous pastor, especially in worship leadership, the church will experience decline. If the interim is equally competent and serves for 18 to 24 months, the people will bond with the interim. This will require another major relational transition for them to handle when their new pastor arrives.

Q *So you are not in favor of long term interims. Are there no exceptions?*

A Sure. Where there has been a real trauma to the church a long term interim can be useful. Even in this situation it is better for the church to have the option to call the interim as the permanent pastor. But this is no longer an interim. It is a designated pastor.

Q *Are interims going to want to serve in churches for three months at a time?*

A Many will not. But we will need fewer interims. Interim ministry is only one bridging option to span the gap between a departing pastor and an arriving pastor. Larger churches can have overlap strategies or use existing staff to bridge the gap. Smaller churches can flourish with lay leadership in key positions and high quality pulpit supplies. Medium sized churches are perhaps most at risk during a transition and will need careful oversight. But this is all the more reason for a Pastoral Succession Planning approach which holds more promise for getting the quality resources a church needs when those resources are needed.

Q *Sounds like this model is going to involve more interaction between departing and arriving pastors. Is there a biblical model for how we could deal with our predecessors and successors?*

A Jesus succeeded John the Baptist who was his successor. Peter and the disciples succeeded Jesus. Jesus modeled important principles and openly talked about both, though his disciples tried to discourage him. Today the opposite is the case. Lay people want to talk more openly about this, but the clergy discourage it, largely out of fear.

Q *Are you saying that a pastor should have a role in the Pastoral Succession Plan?*

A Sure! The pastor needs to make sure that his people have resources and training. The pastor needs to have a vision of a positive process and future for the church. The pastor needs to support the process from the pulpit. The pastor, in some cases, may even suggest names to the search committee. The pastor needs to follow the plan and encourage others to follow the plan. But, the pastor also needs to practice a disciplined absence from many aspects of the plan including the development of the plan itself and the selection of those on the transition and search committees.

Q *What is a transition committee?*

A A transition committee is the organizational unit that carries out the Pastoral Succession Plan. It typically has number of functions, including communication, search, strategic formulation, personnel, financial, spiritual oversight, data gathering, and external resources. In smaller churches the governing board of a church may co-opt additional members and become the transition committee. In cases where the pastor moderates the governing board, it is important that another person be selected as chair.

Q *How does a Pastoral Succession Planning process get started?*

A Typically with a weekend retreat or workshop that trains the leaders in succession planning. Since most lay leaders have no experience with succession planning in the church, spiritual guidance and practical training are extremely important at the outset.

Q *Will judicatories support Pastoral Succession Planning?*

A Some will want to wait to see how it works in other places before they take the risk. But there are many early adopters in judicatories across the country who are beginning to see the fruit of Pastoral Succession Planning in the churches where they are permitting it. As the "gap" or "vacancy" time drops for churches in transition, so does the number of churches in transition, and that makes the transitional ministry easier to manage at the judicatory level. Everyone wins.

Q *What is the future of Pastoral Succession Planning?*

A Succession Planning is certainly not a panacea. But I believe that it represents a major paradigm shift in the Christian church across the country. The Christian church faces many challenges in its external environment today. It does not need a transition process that leaves it weakened and disheartened.